

Individuals Authorized Access to the CMS Computer Services (IACS)



User Group Administrator (UGA)


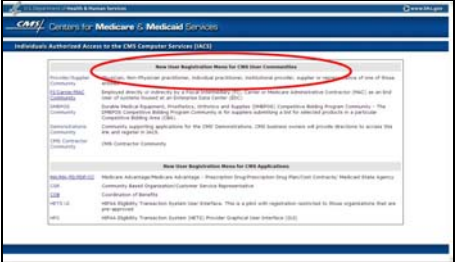
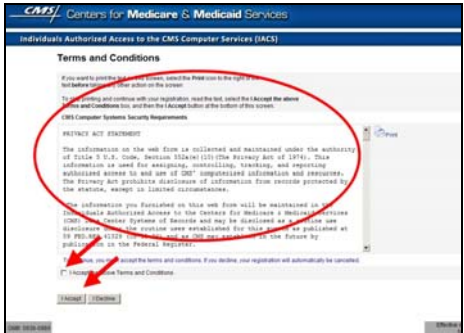
New User Registration – Quick Reference Guide

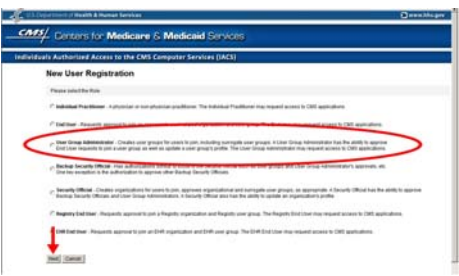


This Quick Reference Guide provides the step-by-step instructions for self-registration as an IACS User Group Administrator. This guide also includes instructions to log in to IACS for the first time and change your temporary, one-time password.


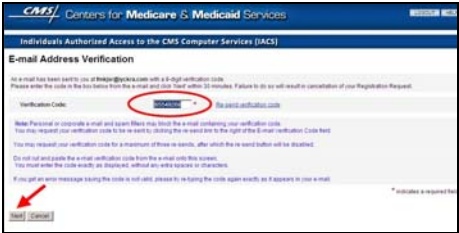
A User Group Administrator is the person who can register the User Group within an Organization and update the User Group profile information in IACS. There can be multiple User Group Administrators for the same User Group within an Organization. The User Group Administrator is trusted to approve the access requests of End Users for that User Group. The User Group Administrator is approved by the Security Official or Backup Security Official. This guide assumes the User Group Administrator will create a User Group during registration.


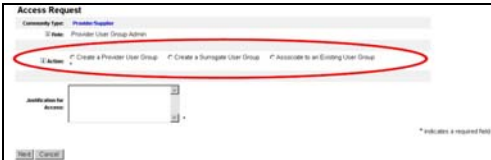
The Steps for IACS New User Registration for a User Group Administrator are:



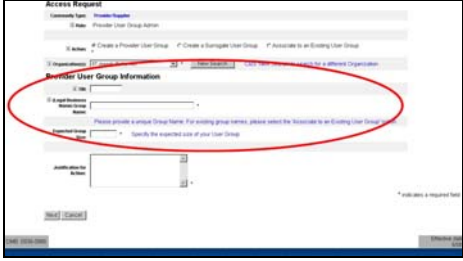
Step	Action	Screen Displayed
Step 1	Go to the CMS Applications Portal website: https://applications.cms.hhs.gov	
Step 2	Read the contents of the CMS Applications Portal WARNING / REMINDER screen. Select the Enter CMS Applications Portal button.	
Step 3	Select the Account Management hyperlink on the menu bar toward the top of the CMS Application Portal Introduction screen.	

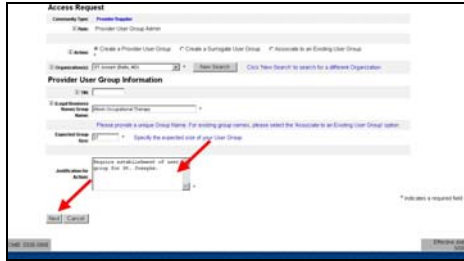

Step	Action	Screen Displayed
Step 4	<p>Refer to the Help Resources portion of the screen and record the contact information for your Help Desk.</p> <p>Note: If you need assistance with the registration process, contact your Help Desk.</p> <p>Select the New User Registration hyperlink on the Account Management screen.</p>	
Step 5	<p>Select a CMS User Community on the New User Registration Menu for CMS User Communities portion of the screen by selecting the link that best describes your business relationship with CMS.</p> <p>For example: Select the Provider/Supplier Community hyperlink if you belong to the Medicare Provider Community.</p> <p>Note: From time to time, additional applications may be added to IACS. When this occurs, a new section entitled New User Registration Menu for CMS Applications will be added to the bottom of the New User Registration Menu screen which will allow users to register for these new applications.</p>	
Step 6	<p>Read the Terms and Conditions - Privacy Act Statement.</p> <p>Select the I Accept the above Terms and Conditions box.</p> <p>Select the I Accept button.</p>	



Step	Action	Screen Displayed
Step 7	<p>Select the role of User Group Administrator on the New User Registration screen by selecting the radio button to the left of the User Group Administrator role.</p> <p>Select the Next button.</p>	
Step 8	<p>Read the User Group Administrator - Terms and Conditions.</p> <p>Select the I Accept the above Terms and Conditions box.</p> <p>Select the I Accept button.</p>	
Step 9	<p>On the New User Registration screen enter the required information in the User Information fields, as follows:</p> <p>Enter your name, date of birth and Social Security Number (SSN) exactly as it is on file with the Social Security Administration (SSA).</p> <p>Note: Your first and last name, SSN and date of birth will be validated against data at the SSA.</p> <p>Enter your email address.</p> <p>Select the Next button.</p>	



Step	Action	Screen Displayed
Step 10	<p>If SSA validates your SSA information successfully, the Email Address Verification screen will appear.</p> <p>Leave this screen open while you proceed to the next step.</p> <p>Note: You will have 30 minutes to complete Steps 11 and 12.</p> <p>Note: If your SSA information cannot be validated, please, contact your local SSA office. Contact information can be found at http://www.ssa.gov on the SSA website.</p>	
Step 11	<p>Go to your email inbox and open the message with the email Verification Code. The subject line will read: Email Address Verification.</p> <p>Record the Verification Code provided.</p>	<p><i>You are receiving this email in response to a Registration request being submitted by you in IACS. Please enter the following code in the Registration window to complete verification and proceed with your request.</i></p> <p>Verification Code: <your code will appear here></p> <p><i>Thank you,</i></p> <p>IACS</p> <p><i>Please do not reply to this system generated email.</i></p>
Step 12	<p>Enter the Verification Code in the Verification Code field on the Email Address Verification screen.</p> <p>Select the Next button.</p>	



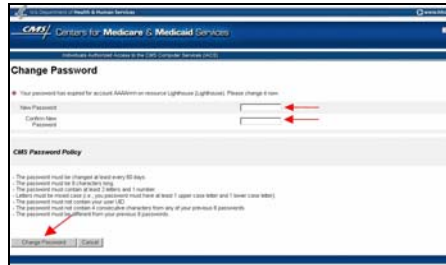

Step	Action	Screen Displayed
Step 13	<p>Enter the required information in the <i>Professional Contact Information</i> fields on the New User Registration screen.</p> <p>Note: The fields in the <i>User Information</i> portion of the screen have been pre-populated and cannot be changed at this point.</p> <p>Note: The <i>Country</i> input field is prepopulated with the United States and cannot be modified.</p>	
Step 14	<p>Note: This Quick Reference Guide covers steps for creation of a provider user group.</p> <p>Select the appropriate radio button option to the right of the Action label in the <i>Access Request</i> portion of the New User Registration screen. The radio buttons are:</p> <ul style="list-style-type: none"> • Create a Provider User Group – Will create a user group within the Organization. • Create a Surrogate User Group – Will create a user group for an entity that works on behalf of the Organization. • Associate to an Existing User Group – Will associate to an existing user group in the selected Organization. <p>Note: Access to CMS applications may be restricted, based on your User Group membership.</p>	




Step	Action	Screen Displayed
Step 15	<p>Enter Organization Search information in the <i>Organization Search</i> fields. Provide, at a minimum, all or part of the Business Name of the Organization and the State or Territory in the Organization's address.</p> <p>Note: The <i>Country</i> input field is prepopulated with the United States and cannot be modified.</p> <p>Select the Search button.</p>	
Step 16	<p>Select your Organization from the drop-down list in the <i>Organization(s)</i> field in the Organization Details area of the screen.</p>	
Step 17	<p>The screen will refresh and will display a new User Group Information area.</p> <p>Note: The title of this portion of the screen will depend on the type of user group that was selected in an earlier step.</p> <p>Enter the required User Group Information area which is in the Access Request portion of the screen.</p>	

Step	Action	Screen Displayed
Step 18	<p>Enter the reason you are requesting access in the <i>Justification for Action</i> field.</p> <p>Select the Next button.</p>	 <p>The screenshot shows the 'Access Request' form. The 'Justification for Action' field is highlighted with a red arrow. The 'Next' button is also highlighted with a red arrow. The form includes sections for 'Provider User Group Information' and 'Justification for Action'.</p>
Step 19	<p>Review the information on the Review Registration Details screen to make sure the information is correct and then select the desired button:</p> <ul style="list-style-type: none"> • Submit – to submit the registration request • Edit – to return to the New User Registration screen to make changes to information you have entered, such as your Professional Contact Information • Cancel – to cancel your registration request. 	 <p>The screenshot shows the 'Review Registration Details' screen. It displays a summary of the registration information, including fields like First Name, Last Name, Social Security Number, and Company Name. At the bottom, there are three buttons: 'Submit', 'Edit', and 'Cancel', each highlighted with a red box.</p>

Step	Action	Screen Displayed
Step 20	<p>Record your request's tracking number or print the Registration Acknowledgement screen by selecting the Print button to the right of the text.</p> <p>Note: You will need the request tracking number if you need assistance from your Help Desk.</p> <p>Select the OK button on the Registration Acknowledgement screen to complete your registration.</p> <p>Note: The system will send you an email that contains the request tracking number. Contact your Help Desk if you do not receive this email within 24 hours.</p>	
Step 21	<p>Select the OK button in the Confirm Dialogue box to complete your registration.</p> <p>Note: The system will send you an email that contains the request tracking number. Contact your Help Desk if you do not receive this email within 24 hours.</p>	

Step	Action	Screen Displayed
Step 22	<p>Once your request is approved, you will receive two email messages.</p> <ol style="list-style-type: none"> 1. The first email message with subject Line, FYI: User Creation Completed – Account ID Enclosed, will contain your IACS User ID. 2. The second email message with Subject Line, FYI: User Creation Completed – Password Enclosed, will contain a temporary, one-time password. <p>Note: Wait until you receive your IACS User ID and temporary, one-time password to continue to the next step.</p>	
Step 23	<p>Go to the CMS Applications Portal website: https://applications.cms.hhs.gov</p>	
Step 24	<p>Read the contents of the CMS Applications Portal WARNING / REMINDER screen.</p> <p>Select the Enter CMS Applications Portal button.</p>	
Step 25	<p>Select the Account Management hyperlink on the menu bar toward the top of the CMS Applications Portal Introduction screen.</p>	

Step	Action	Screen Displayed
Step 26	<p>Select the My Profile hyperlink on the Account Management screen.</p> <p>Note: Your Help Desk contact information appears on the Help Resources portion of the screen.</p>	
Step 27	<p>Enter your new IACS User ID and temporary, one-time Password in the fields provided on the Login to IACS screen.</p> <p>These are the User ID and Password you received in the two email messages.</p> <p>Select the Login button.</p>	
Step 28	<p>Enter your new Password on the Change Password screen in the New Password field.</p> <p>Enter the same new Password in the Confirm New Password field.</p> <p>Select the Change Password button.</p>	
Step 29	<p>Select the Change Answers to Authentication Questions hyperlink on the My Profile screen.</p>	

Step	Action	Screen Displayed
Step 30	<p>Answer at least two of the ten authentication questions on the Change Answers to Authentication Questions screen.</p> <p>Select the Save button when you have finished answering the questions.</p>	
Step 31	Select the OK button on the Change Answers Results screen.	
Step 32	<p>On the My Profile screen, you may</p> <ul style="list-style-type: none"> Select another option presented on this screen, or Select Logout on the bottom left corner of the screen. 	
<p>For information on how to request access to a CMS Application, please refer to the IACS Request Access to a CMS Application – Quick Reference Guide for Individual Practitioners, Organization Users, and Surrogate Users.</p>		